June 5, 2008

TO: Teresa Parsons
              Director's Review Program Supervisor

FROM: Kristie Wilson
              Director's Review Investigator

RE: **Michael Kinley v The Evergreen State College (TESC)**
              Allocation Review Request No. ALLO-07-056

On April 22, 2008, a Director's Review meeting took place at the Department of Personnel (DOP), 2828 Capitol Boulevard, Olympia, Washington, concerning the allocation of Michael Kinley's position. Present during the meeting were you, Michael Kinley TESC, and myself. Over the telephone was Allen Toothaker, Associate Vice President for Human Resource Services.

Investigator's Finding

My review finds that Mr. Kinley's position is properly allocated as an Office Assistant Lead.

Background

On April 3, 2007 Mr. Kinley filed a Position Review Request (PRR) form to TESC's Human Resource Office requesting that his position be reallocated to the class of Program Support Supervisor 1. Joe Gross, TESC Human Resources Services, reviewed his request and issued his decision by letter dated June 21, 2007. In his letter, Mr. Gross indicated that he not only reviewed the Program Support Supervisor 1 classification but also the following job classifications prior to submitting his decision:

- Office Support Supervisor 1
- Administrative Services Manager A
- Administrative Assistant A
- Locksmith
- Office Assistant Lead

In addition, Mr. Gross met with Mr. Kinley and Patti Zimmerman, Manager of Scheduling and Reports, to gain further information and clarification of Mr. Kinley's duties and responsibilities. In his letter (Exhibit A-3) Mr. Gross outlined the reasons and basis for his denial for each job classification considered.

Summary of Mr. Kinley's perspective

Mr. Kinley asserts that he oversees the day-to-day operation of the Millennium Enterprise System/Electronic Lock program. Mr. Kinley states that this system is a complex and highly specialized system that provides primary security for buildings on TESC campus. Mr. Kinley explained that only three people have access to this system because it requires more of an independent set of skills than those required for metal keys. Mr. Kinley states that he configures and makes electronic keys on a daily basis. Mr. Kinley disagrees with TESC's characterization of the lock system as a "database."

Mr. Kinley asserts that he controls access for all employees of TESC. Mr. Kinley explained that he runs queries in SQL and Oracle databases and then uploads the information into the Millennium program. Mr. Kinley stated that he identifies problems and performs troubleshooting.

Mr. Kinley states that he supervises two full-time permanent employees with limited access to the Millennium system. Mr. Kinley's supervisory duties include assigning daily work, approving and denying leave slips, tracking and scheduling employees' absences, and counseling employees on their work habits. Mr. Kinley states he has hiring authority for students and temporary employees. Mr. Kinley states that when a discipline problem arises, Mr. Kinley works with the first line supervisor to get direction on how to proceed or if he should proceed with the proper action. Mr. Kinley explained the performance evaluation process and that he has written a performance evaluation but did not have signature authority.

Mr. Kinley believes that the Program Support Supervisor 1 classification best fits his job duties.

TESC's Rationale

TESC agrees that Mr. Kinley is responsible for the operation of the key control area and overseeing staff with primarily clerical duties. TESC asserts that Mr. Kinley's work with the existing Millennium system and his involvement in the expansion of the system throughout TESC are his primary duties.

TESC states that the Program Support Supervisor 1 classification performs work requiring knowledge and experience that is specific to a program. TESC states that the Millennium system is not a specific program but a database that supports the system of

electronic keys and locks at the college. This system retains information that is transmitted to receivers that activate the associated doors.

TESC verified with Mr. Kinley's supervisor that he trains new employees, assigns and schedules work, and initially confirms for the supervisor whether or not granting an employee's leave request will disrupt the work of the unit. Final leave approval is performed by the second-level supervisor, not Mr. Kinley. TESC states that Mr. Kinley effectively makes recommendations to his supervisor to implement disciplinary steps. However, Mr. Kinley's authority falls short of that required of a supervisor because he cannot administer the full scope of disciplinary actions. TESC asserts that Mr. Kinley does not have the full range of supervisory authority in his position and he does not have signature authority for appointments, disciplinary actions, or evaluating performance.

TESC feels that the Office Assistant Lead classification is the classification that most closely describes the work assigned to Mr. Kinley's position.

Reason and Basis for Finding

The definition for Program Support Supervisor 1 (PSS 1) states:

> Supervise support staff involved in the performance of duties associated with a highly specialized or technical program(s). Coordinate the operation of a specialized or technical program(s). Act as liaison between the program and outside organizations.

I compared Mr. Kinley's program experience to the DOP's Glossary of Classified Terms program definition, which defines a program as:

> A specialized area, which has specific complex components and discrete tasks that distinguish it from other programs (or the main body of an organization). A program is specific to a particular subject and has a specific mission, goals, and objectives. A program typically has an identifiable funding source and separate budget code.

> The specific components and discrete, specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning, and typically, public contact relating specifically to program subject matter, clients and participants.

> Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks. Independent performance of the specialized tasks usually requires a training period of not less than six months.

Based on the definition of a program and also Mr. Kinley's lack of supervisory authority, I feel that Mr. Kinley's job duties do not reach the level envisioned in the PSS 1 class. For the majority of the time, Mr. Kinley's position is responsible for the Millennium system, which is a software program. Mr. Kinley enters information into an SQL or Oracle database which then uploads to the Millennium system. I do not feel this is an actual program as described in the PSS 1 definition. The Millennium system is an electronic security key system, which provides key cards to TESC employees for access into buildings. I recognize the specialized skills needed to use this system; however, Mr. Kinley's duties do not fall within the program definition intent. Although Mr. Kinley trains new employees, assigns and schedules work, initially approves leave requests, and makes recommendations regarding disciplinary action, his duties do not encompass the full range of supervisory authority. Therefore, I believe Mr. Kinley's position falls within the Office Assistant Lead classification.

The definition for Office Assistant Lead states:

> Clerical, Office Support positions differ from Secretarial positions in that the primary focus of Clerical, Office Support positions is to perform a variety of clerical duties in support of office or unit operations.

The distinguishing characteristics for the Office Assistant Lead states:

> As a unit's designated lead worker, assigns, instructs and checks the work of lower level office support staff, plans and organizes work, and performs a variety of complex clerical projects and assignments such as establishing and revising electronic or manual record keeping systems including data base files, monitoring and evaluating financial records and/or documents, resolving clerical problems, responding to inquiries regarding policies, procedures, and services, drafting correspondence, compiling reports, and reviewing, screening, verifying, and evaluating applications, forms, or requests for information. Duties performed require substantive knowledge of a variety of regulations, rules, policies, procedures, processes, materials, or equipment.

Mr. Kinley clearly assigns, instructs and checks the work of lower level office support staff.

As previously noted by the Personnel Resources Board (PRB), the guidance provided in the Department of Personnel's Classification and Pay Administrative Guide establishes that the following standards are primary considerations in allocating positions:

a) Category concept (if one exists).
b) Definition or basic function of the class.
c) Distinguishing characteristics of a class.

      d) Class series concept, definition/basic function, and distinguishing characteristics of other classes in the series in question.

After reviewing the documentation and comments from all parties with regard to Mr. Kinley's assigned duties and responsibilities, I conclude the Office Assistant Lead classification best describes Mr. Kinley's position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

> An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to the Washington personnel resources board. Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Enclosure: Exhibit List